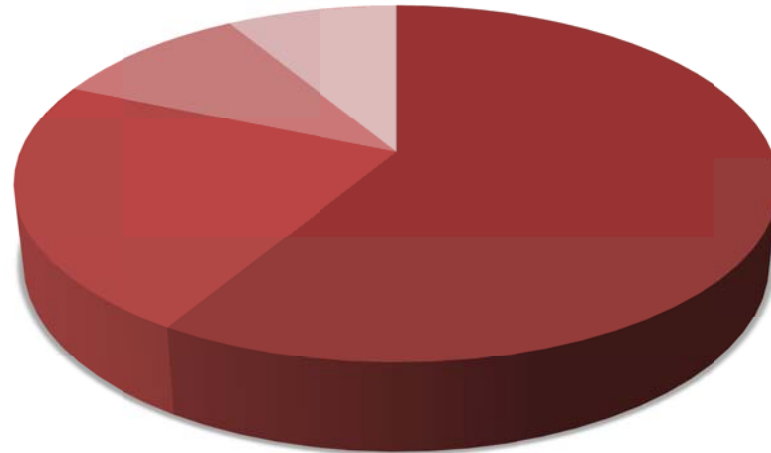




Virginia's Department of Small Business and Supplier Diversity



SWaM Dashboard User Manual

View the SWaM Expenditure Dashboard

Please click on the SWaM Dashboard link located on the right side of the SBSD main website: <http://www.sbsd.virginia.gov>

OR

Go to the Dashboard site directly at this link: <https://portal.bfountain.com/virginia/index.jsp>

The screenshot shows the Virginia Department of Small Business and Supplier Diversity (SBSD) website. The browser address bar displays <http://www.sbsd.virginia.gov/>. The website header includes the Virginia.gov logo, navigation links for Online Services, Commonwealth Sites, Help, and Governor, and a search bar. The main banner identifies the Department of Small Business and Supplier Diversity (SBSD) as a new agency formed through the merger of DMBE and Virginia DBA.

The left sidebar contains a navigation menu with the following links:

- Home
- About Us
- SWaM Certification
- DBE Certification
- SWaM Vendor Search
- DBE Vendor Search
- SWaM Purchasing and Expenditure Reports
- Business Information Services
- Small Business Finance Authority
- Programs
- Special Request Forms
- Procurement and Business Opportunities
- Reports
- Frequently Asked Questions
- News and Resource Links
- Eight Locations Across the Commonwealth to Serve You

The main content area features a 'Welcome' section with the following text:

We are the state agency dedicated to enhancing the participation of our small, women- and minority-owned businesses in Virginia's procurement process.

The Department of Small Business and Supplier Diversity (SBSD) administers three certification programs:

- SWaM:** The **Small, Women-owned, and Minority-owned Business (SWaM)** certification program is a state program of the Commonwealth of Virginia. The purpose is to enhance procurement opportunities for SWaM businesses participating in state-funded projects.
- DBE:** The Disadvantaged Business Enterprise certification program is a Federal program. The purpose is to increase the participation of certified DBEs in projects funded by the US Department of Transportation and other federal sectors.
- ESO:** "Employment services organization" means an organization that provides community-based employment services to individuals with disabilities that is an approved Commission on Accreditation of Rehabilitation Facilities (CARF) accredited vendor of the Department for Aging and Rehabilitative Services.

Below the list, there are links to 'Apply for SWaM' (with sub-links for initial certification and re-certification), 'Apply for DBE' (with sub-link for apply), and 'Apply for ESO' (with sub-links for Application Form (PDF) and (Word)).

An 'Important Notice' states: *If you are a non-Virginia based business, you might not be eligible for participation in the Virginia Small, Women- and Minority-owned Business Program. Please review the "SBSD Certification Policy of Applications from Non-Virginia Based Businesses" before applying online for SWaM certification or recertification. (Click here)*

The right sidebar, titled 'What's Hot', contains the following links:

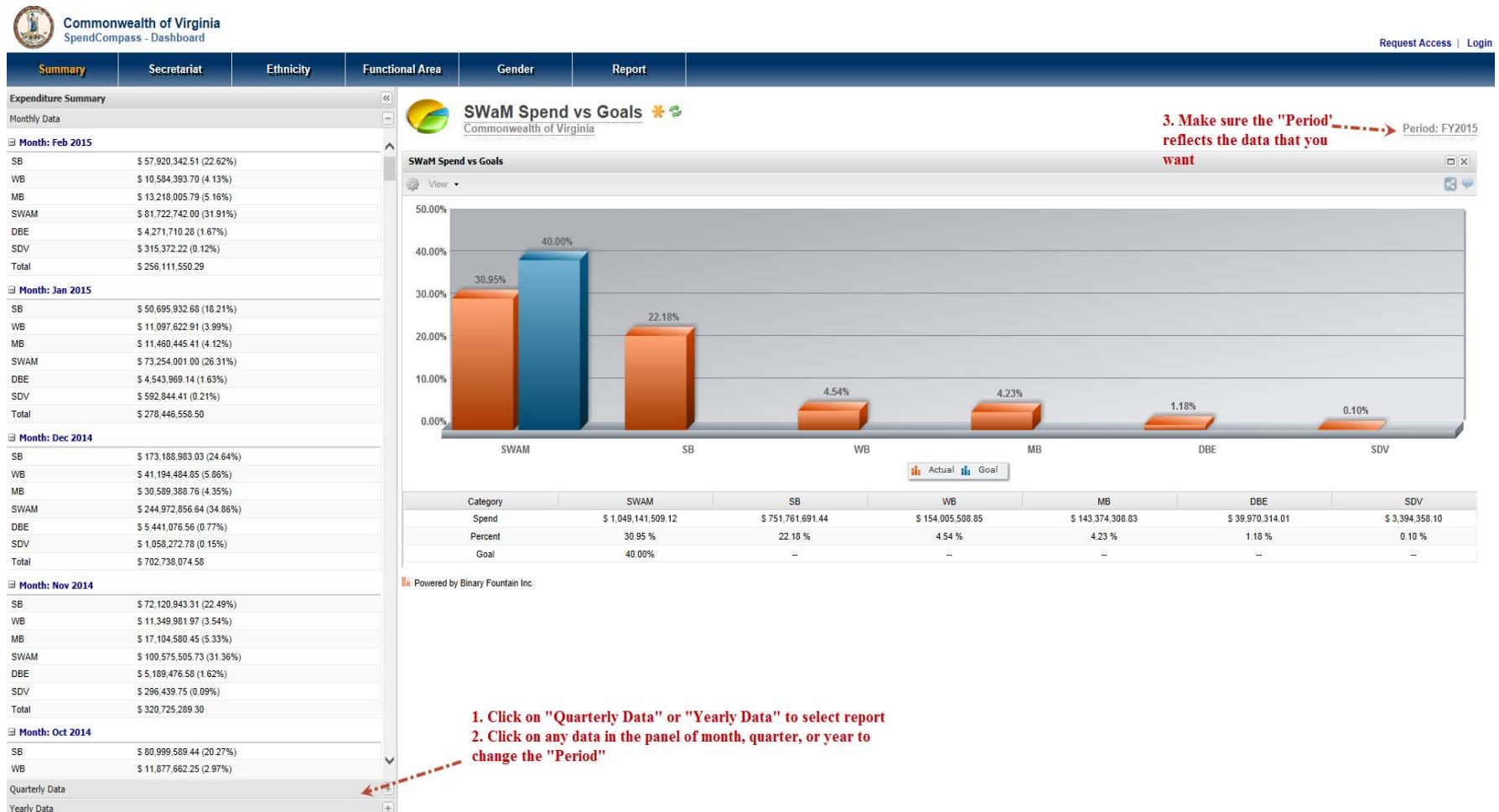
- SWaM Certification Application Status
- SWaM Dashboard (highlighted with a red arrow and the text 'Click Here')
- SWaM Vendor Directory
- DBE Certification Forms and Process
- DBE Vendor Directory of VA Unified Certification Program

Below the 'What's Hot' section is a 'Quick Links' section with the following links:

- National Institute of Governmental Purchasing (NIGP) Commodity Codes
- North American Industry Classification System (NAICS) Codes
- DUNS Number

Public View

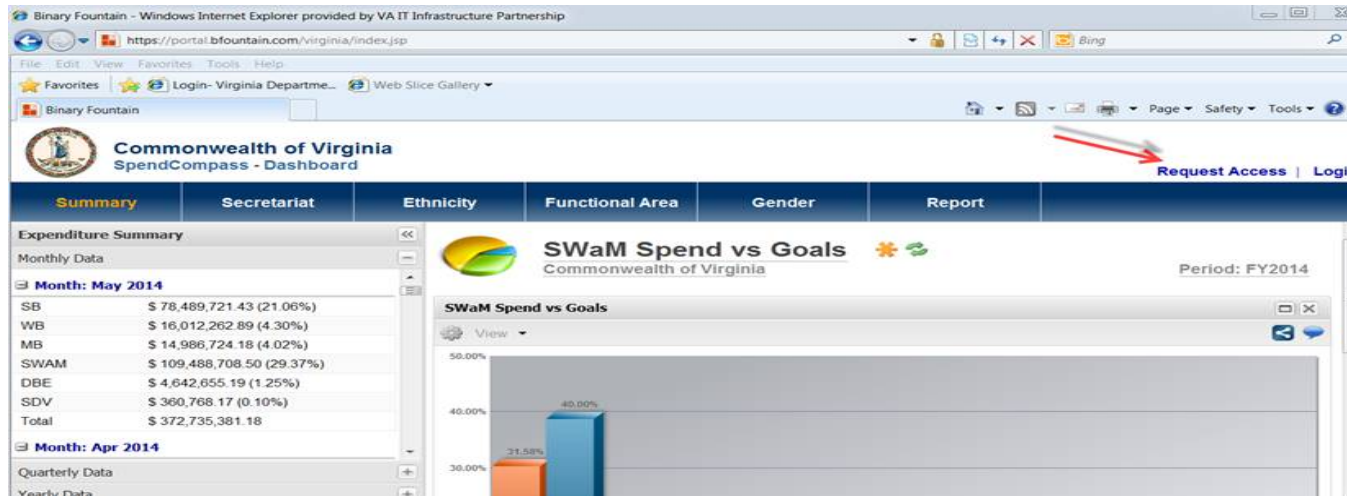
To view the expenditures and analysis on the Dashboard, a logon name with password is not required. It is required for submitting data to the Dashboard and reviewing the agency's detailed transactions only.



Access to Agency Expenditure Sites

A logon name and password are required for submitting data to the dashboard and reviewing the agency's detailed transactions. You can request for access online at the SWaM Dashboard Home page.





- Click on “Request Access” (see below)



- Enter required information into the online form
- Select your agency or agencies
- Select your “Role” – Most of state users are “Agency User” and each agency can only have one (1) “Agency Plan Administrator” who is in charge of Annual Agency SWaM Plan” submission
- Click “Submit” button
- You will receive your password in a system generated email and then you can click on “Login” to see your agency information
- If you forget your password after it is issued to you, click on “Login” and “Forgot Password” in the next screen. The system will send you a new password to your email address.

Once you log into the application, there are a number of icons in the top right corner of the screen to guide you through the dashboard.



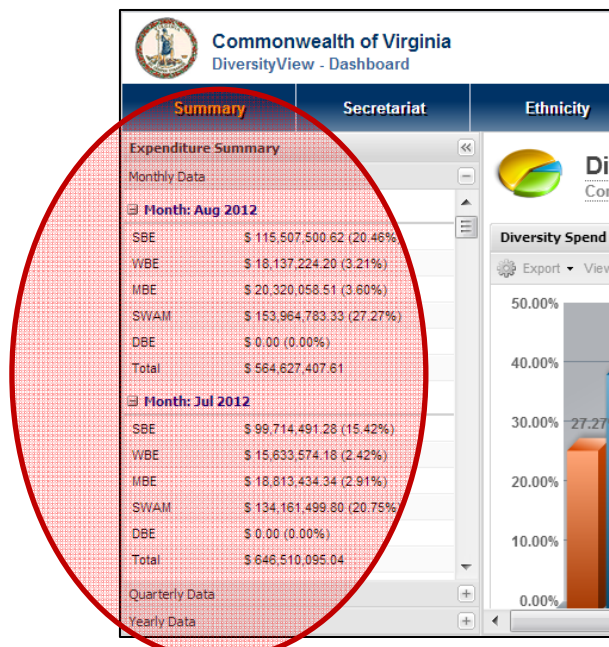
-  **Go to Homepage**
Takes you back to the homepage you have designated. The default homepage is the summary tab. Each user can designate their own home page and navigate directly to that page when they log in.
-  **Go to Dashboard Area**
Selecting this button takes the user to the default dashboard page: the Summary view.
-  **Go to Data Area**
Takes the authorized users to the administrative area where they can manage their transactions, subcontractor data and their annual SWAM plans.
-  **Help**

Diversity Dashboard and Analytics

To see further details or alternate breakdowns of agency SWaM expenditures, click the tabs located at the top of the graphical chart on the DMBE Dashboard.

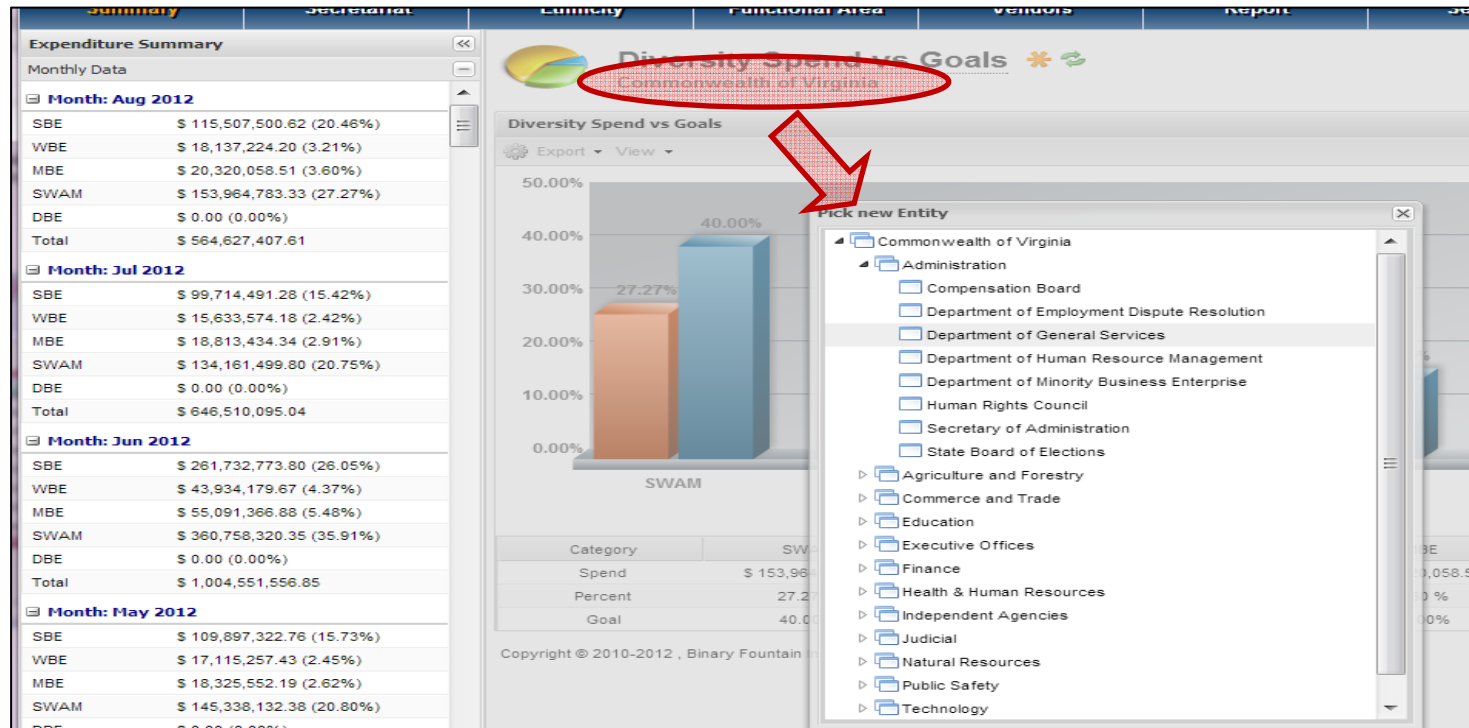


In order to be able to analyze specific “Expenditure Summary”, will provide the Discretionary spend. The detailed expenditure Monthly periods. Click on any period on the be presented in the report. The user selections be used during their future logins.

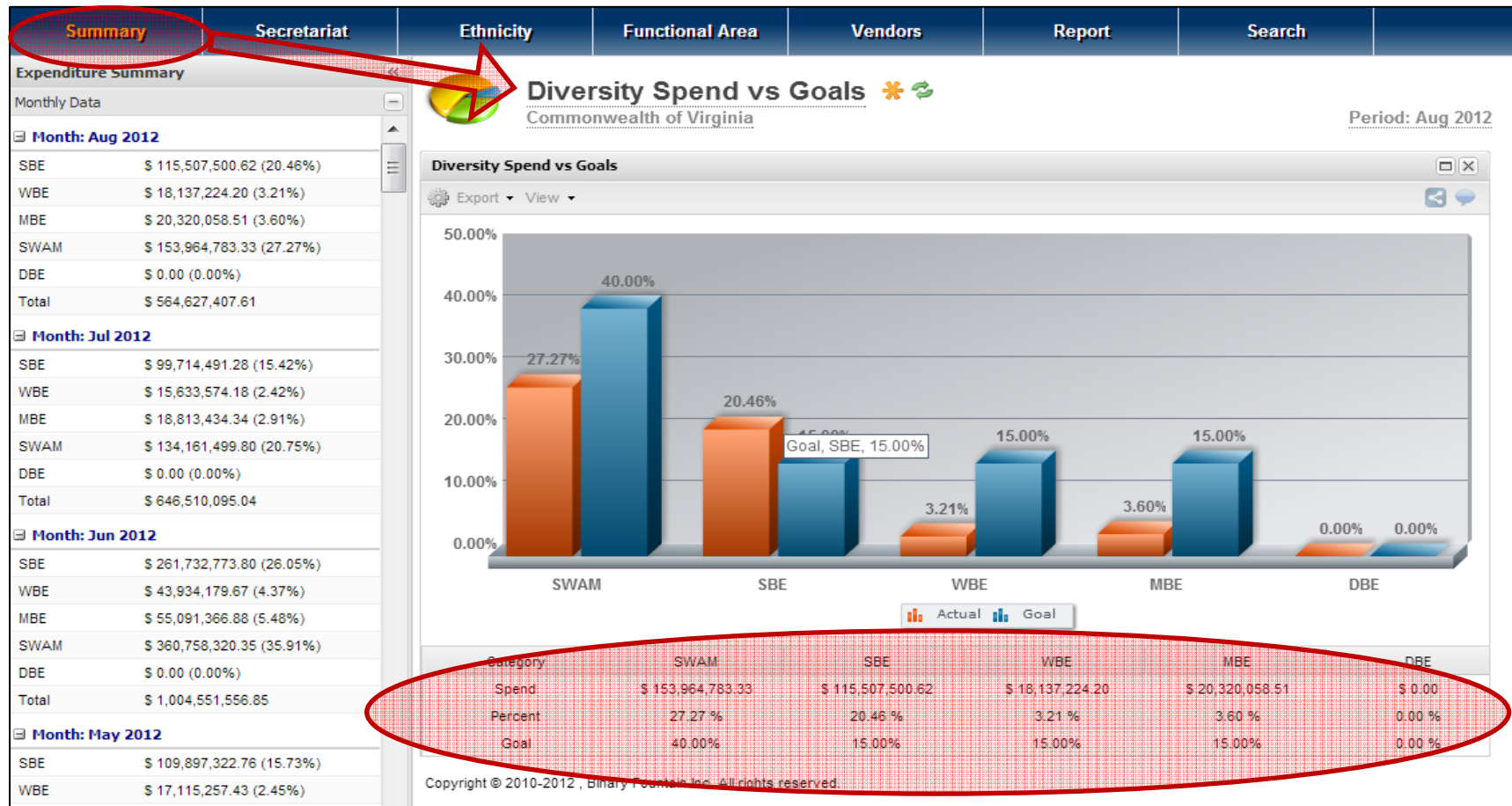


expenditure time periods, the left column, titled detailed expenditure drill down for SWaM amounts can be analyzed for Yearly, Quarterly and LHS, and the data for the corresponding period will are sticky – their period selection is saved and will

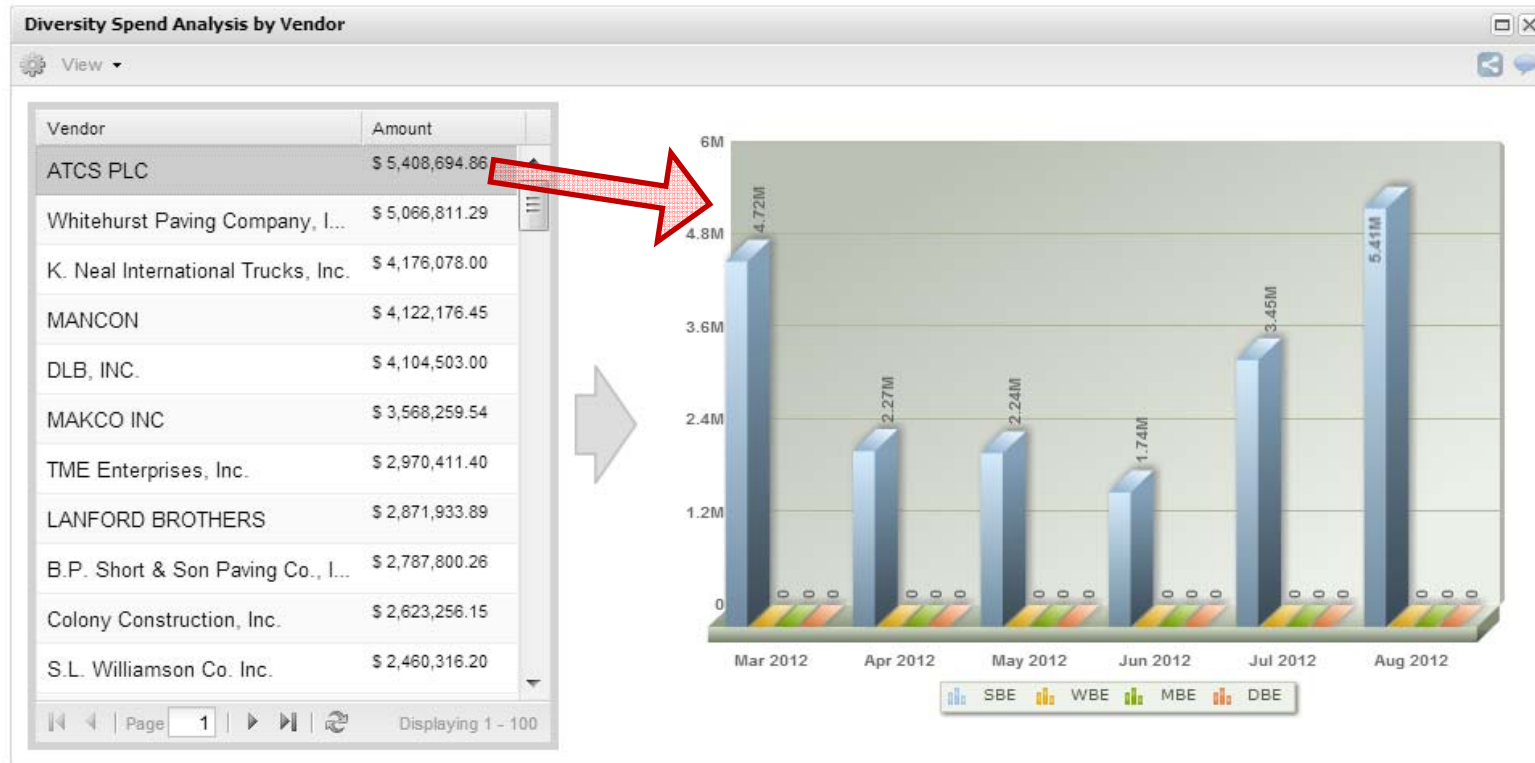
To analyze the data for a specific agency, the user can click on the name the current entity (Secretariat, Commonwealth, Agency) in the content area, and selecting an alternate agency from the list.



The application is tightly integrated with the SWAM Procurement plan and the dashboard shows the percentage of the current diversity expenditures against their current fiscal goals for all agencies.



Authorized users will also be able to view the expenditure trends by vendor. Trends are available by month, quarter or year based on the period selected.



To view and download the SWaM expenditure in full (All Secretariats) go to the "Report" tab for all expenditures for the correlating periods are shown in detail, drilled down by agency with subtotals and totals.

Expenditure Reports
Commonwealth of Virginia

Period: Aug 2012

Expenditure Report

View Download

- Expenditure Summary by Agency
- Percentage of Expenditures by Agency
- Expenditure Summary by Source
 - All Sources
 - Adjustment
 - Self Reporting
 - Subcontractor
 - CARS
 - GE
- Percentage of Expenditures by Source
- Expenditure Summary by Functional Area
- Percentage of Expenditures by Functional Area
- Expenditure Summary by Ethnicity
- Percentage of Expenditures by Ethnicity
- Department of Planning and Budget

	WBE	MBE	DBE	SWAM	Non SWAM	Total
Diversity Expenditure Summary by Agency						
Department of Planning and Budget	\$ 0.00	\$ 130.23	\$ 0.00	\$ 130.23	\$ 962.22	\$ 1,092.45
	\$ 137.10	\$ 917.44	\$ 0.00	\$ 2,827.41	\$ 33,486.72	\$ 36,314.13
	\$ 137.10	\$ 1,047.67	\$ 0.00	\$ 2,957.64	\$ 34,448.94	\$ 37,406.58
	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 389.39	\$ 389.39
	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 389.39	\$ 389.39
Public Safety						
Department of Military Affairs	\$ 879,869.56	\$ 268,905.54	\$ 54,019.23	\$ 1,202,794.33	\$ 1,612,129.41	\$ 2,814,923.74
Department of Emergency Management	\$ 345,828.42	\$ 8,151.55	\$ 66.00	\$ 354,045.97	\$ 417,278.91	\$ 771,324.88
	\$ 1,225,697.98	\$ 277,057.09	\$ 54,085.23	\$ 1,556,840.30	\$ 2,029,408.32	\$ 3,586,248.62
Administration						
Department of Human Resource Management	\$ 801,964.95	\$ 182.07	\$ 1,783.94	\$ 803,930.96	\$ 69,096.57	\$ 873,027.53
State Board of Elections	\$ 111,550.60	\$ 45,172.25	\$ 10,685.27	\$ 167,408.12	\$ 502,228.60	\$ 669,636.72
	\$ 913,515.55	\$ 45,354.32	\$ 12,469.21	\$ 971,339.08	\$ 571,325.17	\$ 1,542,664.25

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Download SWaM payments:

The ad-hoc search tab is located at the farthest right of the tabular area on the dashboard. This will allow authorized users of an agency to see all the detailed expenditures posted according to the period and type of expenditure. The search function for the dashboard is located on the top right hand corner of the reporting area. Once clicked, a pop-up window for search parameters will appear.

Adhoc Search
Commonwealth of Virginia

Period: Aug 2012

Search for Transactions

Export

Agency	Vendor	Ethnicity	Functional Area	Source	Amount	Post Date
Department of General Services	Enterprise	Unspecified	Unspecified	Subcontractor	\$ 45.19	Aug, 2012
Department of General Services	Universal Ford	Unspecified	Unspecified	Subcontractor	\$ 45.19	Aug, 2012
Department of General Services	Enterprise	Unspecified	Unspecified	Subcontractor	\$ -1,923.79	Aug, 2012
Department of General Services	Canaan Printing	Other	Goods & Services	Subcontractor	\$ 1,923.79	Aug, 2012
Department of General Services	Enterprise	Unspecified	Unspecified	Subcontractor	\$ -1,429.56	Aug, 2012
Department of General Services	Fastsigns	Unspecified	Unspecified	Subcontractor	\$ 1,429.56	Aug, 2012
Department of General Services	Enterprise	Unspecified	Unspecified	Subcontractor	\$ -3,500.00	Aug, 2012
Department of General Services	Dutt & Wagner	Unspecified	Unspecified	Subcontractor	\$ 3,500.00	Aug, 2012
Department of General Services	Enterprise	Unspecified	Unspecified	Subcontractor	\$ -265.50	Aug, 2012
Department of General Services	It's Snack Time	Unspecified	Unspecified	Subcontractor	\$ 265.50	Aug, 2012
Department of General Services	Enterprise	Unspecified	Unspecified	Subcontractor	\$ -1,390.25	Aug, 2012
Department of General Services	Carolina Clean	Unspecified	Unspecified	Subcontractor	\$ 1,390.25	Aug, 2012
Department of General Services	G4S Integrated	Unspecified	Unspecified	Subcontractor	\$ -199.54	Aug, 2012
Department of General Services	After Hours	Unspecified	Unspecified	Subcontractor	\$ 199.54	Aug, 2012
Department of General Services	G4S Integrated	Unspecified	Unspecified	Subcontractor	\$ -1,740.56	Aug, 2012
Department of General Services	Allen Tire	Unspecified	Unspecified	Subcontractor	\$ 1,740.56	Aug, 2012
Department of General Services	G4S Integrated	Unspecified	Unspecified	Subcontractor	\$ -1,813.05	Aug, 2012
Department of General Services	American Print	Unspecified	Unspecified	Subcontractor	\$ 1,813.05	Aug, 2012

Search transactions

Search Parameters: Aug 2012

Agency:

Vendor Id:

Vendor Name:

Ethnicity Name:

Functional Area Name:

Source:

Contract Id:

Page 1

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Dashboard Data Management

Overview:

Access to the SWaM dashboard is required for submitting data to the Dashboard and reviewing the agency's detailed transactions.

Subcontracting expenditures are also submitted on the dashboard.

All transactions are maintained in one of three states –


- Transactions are on **Hold** as soon as they are entered into the system. They remain in this state until the transactions are approved to be included into the dashboard.
- When the dashboard is refreshed, all approved transactions are rolled into the dashboard and they enter the **Posted** state. All transactions remain in this state while they are in the dashboard. You can modify or adjust any transaction in the system and it will then be placed back in the Hold status until the approval cycle works all over again.

The dashboard refresh of SWaM Expenditures is performed monthly around the 20th of each month for the previous month. It is not a real-time system. If April expenditures are reported late, after the refresh date has passed, the amounts will not be automatically included in the posted April expenditures. You can always view what state your transactions are currently in. Using the “View” menu in the data management screens, you can choose to see all the transactions (default view) or filter only the transactions in one of the three states.





To Make Adjustments:

Adjustments are used to change the value of CARS and Purchase Card transactions. While the original transactions cannot be altered, the adjustments will replace the original transaction. You can change the Vendor Id, Vendor Name, and the amount of the transaction (just enter the new amount that should replace the original on the CARS or Purchase Card transaction).



Please note that while you can edit self-reporting transactions, you can only **adjust CARS and Purchase Card transactions**.

**Commonwealth of Virginia**
System Administration

Welcome Angela Chiang









Transaction | Subcontractor | Document
















**Transaction Management** * 
System Administration

Adjust Transaction

Workspace View - Posted Transactions

 Manage |  View |  Download |  Upload

 Search |  Help Video

<input type="checkbox"/>	Source Name	Agency Name	Vendor Name	Amount	Post Date	Status	Actions
<input type="checkbox"/>	CARS	Department of General Services	BUTTERBALL LLC	\$ 14,026.27	Feb 2015	Posted	
<input type="checkbox"/>	CARS	Department of General Services	NATIVE GREEN LLC	\$ 35,897.25	Feb 2015	Posted	
<input type="checkbox"/>	CARS	Department of General Services	MCDONOUGH BOLYARD PECK INC	\$ 5,499.00	Feb 2015	Posted	
<input type="checkbox"/>	CARS	Department of General Services	WILEY AND WILSON	\$ 3,303.00	Feb 2015	Posted	
<input type="checkbox"/>	CARS	Department of General Services	MANSFIELD OIL COMPANY	\$ 21.06	Feb 2015	Posted	
<input type="checkbox"/>	CARS	Department of General Services	MANSFIELD OIL COMPANY	\$ 70.61	Feb 2015	Posted	
<input type="checkbox"/>	CARS	Department of General Services	MANSFIELD OIL COMPANY	\$ 48.12	Feb 2015	Posted	
<input type="checkbox"/>	CARS	Department of General Services	MANSFIELD OIL COMPANY	\$ 260.13	Feb 2015	Posted	
<input type="checkbox"/>	CARS	Department of General Services	MANSFIELD OIL COMPANY	\$ 8.46	Feb 2015	Posted	
<input type="checkbox"/>	CARS	Department of General Services	MANSFIELD OIL COMPANY	\$ 12.79	Feb 2015	Posted	
<input type="checkbox"/>	CARS	Department of General Services	MANSFIELD OIL COMPANY	\$ 28.05	Feb 2015	Posted	
<input type="checkbox"/>	CARS	Department of General Services	NATIONAL SANITARY SUPPLY INC	\$ 2,731.02	Feb 2015	Posted	
<input type="checkbox"/>	CARS	Department of General Services	TOVA INDUSTRIES LLC	\$ 23,896.80	Feb 2015	Posted	
<input type="checkbox"/>	CARS	Department of General Services	TOVA INDUSTRIES LLC	\$ 143.70	Feb 2015	Posted	
<input type="checkbox"/>	CARS	Department of General Services	SOUTHERN DODGE CHRYSLER JEEP RAM	\$ 171,846.64	Feb 2015	Posted	

Page 1

Displaying 1 - 100

The search function for the transactions is located on the top right hand corner of the transaction management area. Once clicked, a pop-up window will appear to specify search parameters.

The screenshot displays the 'Transaction Management System Administration' interface. The top navigation bar includes tabs for Setup, Vendor, Transaction (highlighted), Subcontractor, SWAM Plan, File Transfers, and Security. The main workspace is titled 'Workspace View - Transactions on Hold' and contains a table of transactions. A red circle highlights a 'Search' button in the top right corner of the table area. A red arrow points from this button to a 'Search transactions' pop-up window. The pop-up window contains the following fields:

- Search Parameters:** Select Year (dropdown)
- Agency:** Select agency (dropdown)
- Vendor Id:** (text input)
- Vendor Name:** (text input)
- Source:** Select source (dropdown)
- Contract Id:** (text input)
- Search record** (button)

The background table lists transactions with columns: Source Name, Agency Name, Vendor Name, Amount, Date, and Actions. The footer shows 'Page 1' and 'Displaying 1 - 25'. Copyright © 2010-2012, Binary Fountain Inc. All rights reserved.

Correcting Transactions and Uploading Adjustments

Adjustments are changes to existing transactions and cannot be uploaded directly into the system without referring to the CARS or Purchase Card transactions that are being adjusted. The system uses a different three-step process to upload adjustments to the dashboard.



1. Download the transactions to be adjusted using the “Download” menu item in the Transaction Management screen.
2. Make the necessary edits to the downloaded transactions. Update the status column in the downloaded file to show the nature of the change.
3. The status column must be set to Update for a record to be updated.
4. The status column must be set to Delete for a record to be deleted.
5. Upload the modified transaction file back through the “Correct Transactions” link under the “Upload” menu item.
6. Corrections to CARS and P-Card transactions result in Adjustments.
7. Corrections to self-reporting transactions are entered in place – the original transactions will be modified with the updated values.
8. CARS and P-Card transactions cannot be deleted – the system will show an error in the output logs.

Entering Expenditure Data - Self Reporting Agencies:

In the “Transactions” area, click on the “Add Record” menu item located on the top left hand side of the Transaction Management screen. A pop-up titled “Add new transaction data” should appear. Fill in all the required data and click “Update Record” to add a new transaction.

The screenshot displays the 'Transaction Management System Administration' interface. The top navigation bar includes tabs for Setup, Vendor, Transaction, Subcontractor, SWAM Plan, File Transfers, and Security. The main workspace shows a table of transactions with columns for Agency Name, Vendor Name, Amount, Post Date, and Actions. A red circle highlights the 'Add new record' option in the 'Manage' dropdown menu. A red arrow points from this option to the 'Adjust Transaction' pop-up form. Another red circle highlights the 'Update Record' button at the bottom of the form. A third red arrow points from the 'Update Record' button to the 'Add new record' option. The 'Adjust Transaction' form contains the following fields:

- Post Date:** 2010-09-01
- Contract Id:**
- Agency Name:** Department of Behavioral Health and Developmental Services
- Vendor Id:** 10381697
- Vendor Name:** TD EQUIPMENT FINANCE
- Source Name:** Adjustment
- Amount:** -1825.77
- Transaction Date:** 0010-09-01
- Notes:** Note: This adjustment will replace the CARS record from Department of Behavioral Health and Developmental Services to TD EQUIPMENT FINANCE (10381697) for the amount of \$ -1,825.77 dated 09/01/0010 and posted on 09/01/2010.

The 'Update Record' button is located at the bottom of the form.

Uploading Self-Reporting transactions

Uploading an excel spreadsheet is also another option available to enter self-reporting data.

Choose the “Self-Reporting Data” option in the menu called “Upload” in the transaction management screen. Select Excel Spreadsheet. A pop up (below) will appear. Upload the file and click “Submit”.

Once the file is uploaded, the entries will appear in the Hold state, awaiting SBSD approval. The user can edit expenditures that requires editing or correcting, prior to SBSD approval and dashboard refresh.

Entering Subcontractor Data

In the “Subcontractor” area, click on the “Add Record” menu item located on the top left hand side of the Subcontractor Data Management screen. A pop-up titled “Add new transaction data” should appear. Fill in all the required data and click “Update Record” to add a new transaction.

The screenshot displays the 'Subcontractor Data Management' system interface. The top navigation bar includes tabs for Setup, Vendor, Transaction, Subcontractor (highlighted), SWAM Plan, File Transfers, and Security. The main workspace shows a table of transactions with columns for Agency Name, Subcontractor, Contract Id, Amount, Post Date, and Actions. A red circle highlights the 'Add new record' menu item in the top left corner. A red arrow points from this menu item to the 'Edit Transaction - 37587' pop-up form. Another red arrow points from the 'Update record' button at the bottom of the form to the 'Add new record' menu item. The pop-up form contains the following fields:

- Post Date: 2012-09-01
- Contract Id: EP739437
- Agency Name: Piedmont Virginia Community College
- Prime Vendor Tax Id: 541040308
- Prime Vendor Name: Cavalier Services Inc.
- Subcontractor Tax Id: 540673569
- Subcontractor Name: Lawrence Sanitary Company, Inc.
- Amount: 421.61
- Prime Vendor Contact Email:
- Transaction Date: 2012-10-26
- Subcontractor Contact Email:
- Notes:

The 'Update record' button is located at the bottom of the form.

The search function for the subcontractor transactions is located on the top right hand corner of the transaction management area. Once clicked, a pop-up window will appear to specify search parameters. One or more of these parameters will help to filter the records in the current screen.

Subcontractor Data Management
System Administration

Workspace View - Transactions on Hold

Manage View Export Import

Agency Name	Prime Vendor	Subcontractor	Contract Id	Amount	Date	Actions
Longwood University	English Construction Co	Structural Steel Co	21417668	\$ 6,000.00	2012-09-01	[Icons]
Longwood University	English Construction Co	B & B Electric	21417668	\$ 7,000.00	2012-09-01	[Icons]
Longwood University	English Construction Co	Special Renovation	21417668	\$ 2,220.00	2012-09-01	[Icons]
Piedmont Virginia Communit...	Cavalier S	...	21718417	\$ 421.61	2012-09-01	[Icons]
Northern Virginia Community...	Little Diver	...	...	...	2012-09-01	[Icons]
Northern Virginia Community...	Simplex G	...	...	...	2012-09-01	[Icons]
Department of Labor and In...	Computer	...	...	...	2012-09-01	[Icons]
Northern Virginia Community...	Little Diver	...	...	...	2012-09-01	[Icons]
Northern Virginia Community...	Little Diver	...	...	...	2012-09-01	[Icons]

Search subcontractors

Search Parameters: Select Year [v]

Agency: Select agency [v]

Prime Vendor Id: [text input] **Prime Vendor Name:** [text input]

Sub Vendor Id: [text input] **Sub Vendor Name:** [text input]

Contract Id: [text input]

Search record

Page 1 | Displaying 1 - 9

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Uploading an excel spreadsheet is also another option in entering subcontractor transactions. Click the menu called “Upload” in the subcontractor data management screen. Select Excel Spreadsheet. A pop up (below) will appear. Upload the file and click “Submit”.

Name of the tab within Excel (Case Sensitive)

Number of header rows (typically 1)

The file to upload

Note: The Header format of the excel sheet to be as follows:

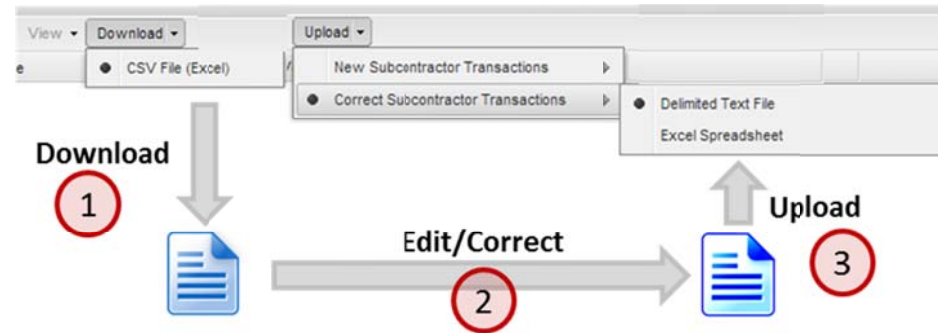
Column	Field Name	Field Type
1.	Agency Code	Text
2.	Prime Vendor Tax ID	Number (9 digits)
3.	Prime Vendor Name	Text
4.	Sub Vendor Tax ID	Number (9 digits)
5.	Sub Vendor Name	Text
6.	Transaction Date	Date as MM/DD/YYYY
7.	Transaction Type	Text
8.	Contract ID	Text
9.	Amount	Decimal (###.##)
10.	Notes	Text
11.	Post Month	Number (1 - 12)
12.	Post Year	Number (20xx)

	A	B	C	D	E	F	G	H	I	J	K	L
	Agency Code	Prime Vendor Tax ID	Prime Vendor Name	Subcontractor Tax ID	Subcontractor Name	Transaction Date	Transaction Type	Contract ID	Amount	Notes	Post Month	Post Year
1	232	768976542	Microsoft Corp.	213425366	Fortis Inc.		Unspecified	C461-98543	76512.34	Security Module	12	2012
2	232	768976542	Microsoft Corp.	467456077	Newton Inc.		Unspecified	C461-98543	86500	Design module	12	2012
3	232	768976542	Microsoft Corp.	978548977	Galileo Corp.		Unspecified	C461-98543	30000.00	Design module	12	2012

Once the file is uploaded, the entries will appear in the Hold state, awaiting SBSD approval. The user can edit subcontractor transactions that requires editing or correcting, prior to SBSD approval and dashboard refresh. The process is similar to the steps in the transaction screen.

Correcting Subcontractor Transactions

While the system allows the user to edit subcontractor transactions one at a time, the user can also choose to correct a set of these transactions using the three-step process shown below.



1. Download the subcontractor transactions to be edited using the Download link in the dashboard.
2. Make the necessary edits to the downloaded transactions. Update the status column in the downloaded file to show the nature of the change.
3. The status column must be set to Update for a record to be updated.
4. The status column must be set to Delete for a record to be deleted.
5. Upload the modified transaction file back through the “Correct Transactions” link.

Data Collection of Total Expenditures for SWaM Report:

<http://www.sbsd.virginia.gov/swampurchasingandexpenditure.html>

[Total Expenditure Extraction for SWaM Reporting \(PDF\)](#) | [\(Word\)](#)

Data collection of Total Discretionary expenditures for SWaM quarterly reports.

[Reportable Object Codes for SWaM reports \(PDF\)](#) | [\(Word\)](#)

Reportable CARS Object Codes object code 1272 has been changed to 1273, 1249 and 2277 have been added (Current as of April 2007).

[SWaM Purchasing Card Reporting Guidelines \(PDF\)](#)

Projected Small, Women and Minority (SWaM) reporting dates FY10.

[SWaM Dashboard Data Update Schedule \(PDF\)](#)

[SBSD Secure FTP User Guide PDF\)](#)

Installation of the file transfer software and downloading certified vendor list.